ASSESSMENT TRAINER

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How to say no to a customer

The best way to say no to a customer, without resorting to email probing, is to follow these steps:

1. Offer an explanation and be direct yet kind:

2. Show empathy before giving the response c

3. Offer an alternative if possible

4. Use a positive ton

5. Be clear and polite

6. Explain the policy or restriction without sounding inflexible:

Examples

If the customer requests a credit limit increase:

“Unfortunately, after reviewing your request, we are unable to approve the credit limit increase at this time. However, we recommend that you contact your program administrator to request a temporary or permanent increase.”

How to connect emotionally with a customer

Listen Actively

Empathy

Personalization

Positive and Approachable Language

Create a Positive Experience

How to Adhere to the Company’s Security Policies

To adhere to the security policies, it is best to read the main ones and provide examples to make them easier to understand. Additionally, it’s important to explain that if any of these policies are violated, it could result in serious or very serious offenses, which could negatively affect the agents.

How would you identify a PTL agent?

The PTL agent is primarily distinguished by their deep technical knowledge, their responsibility for managing complex cases, and their role as a liaison between clients and technical teams. If you’re looking for a PTL agent on your team or wondering if you are one, check if you’re involved in solving more complex technical problems and if you act as an intermediary between customer support and technical teams.

If the agents were delivered late and do not have the necessary credentials to access TP computers or client accounts, the first step would be to communicate the situation to the IT department or the team responsible for access management, so the appropriate credentials can be provided as quickly as possible.

In the meantime, you could:

1. Prioritize theoretical training: Use the time to help the agents become familiar with procedures, protocols, and tools, so they are better prepared when they gain access.

2. Review previous cases or processes: Use past examples to help the agents understand the types of issues they might face, without needing direct access to accounts.

3. Coordinate with the support team: See if there’s a way for supervisors or more experienced agents to handle cases temporarily while the new agents’ access is being managed.